ForwardHealth interChange

Internet Partner Portal Training Guide

For Social Security Administration Staff

Version 1.0
Date Last Updated: October 22, 2008

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Revision History

Document Version Number	Revision Date	Revision Page Number(s)	Reason for Revisions	Revisions Completed By
Version 1.0	10/22/2008		New document	Rich Trotto
Version 2.0				
Version 2.1				
Version 2.2				
Version 2.3				
Version 2.4				

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1 Introduction

1.1 Introduction

This document is a training guide for the navigation and use of the public and secure areas of the **ForwardHealth Partner Portal**.

The ForwardHealth public Partner portal replaces EDSNET and supplies users with online functionality that offers greater flexibility along with the ability to access real-time information.

1.2 Purpose

The purpose of this document is to provide users with an overview of the components that make up the ForwardHealth interChange Partner portal and to provide instruction on how to navigate and perform basic functions in the system.

1.3 Key Terms and Concepts

1.3.1 ForwardHealth Wisconsin

- ForwardHealth brings together many state health care programs with the goal of creating efficiencies for providers and other stakeholders and improving health care outcomes for enrolled members.
  - BadgerCare Plus.
  - Wisconsin Medicaid, including Family Planning Waiver.
  - Wisconsin Well Woman (WWW) Program and WWW Medicaid.
  - SeniorCare.
  - Wisconsin Chronic Disease Program (WCDP).
  - BadgerCare Plus and Medicaid managed care programs.

1.3.2 ForwardHealth InterChange (iC)

- ForwardHealth interChange is a new system which replaces the Medicaid Management Information System (MMIS) which has been in place since 1977.
- Connectivity to the legacy MMIS is being discontinued with the implementation of ForwardHealth interChange.
- Partners will access the new system using the ForwardHealth Portal. The portal will provide access to key information that was previously found on EDSNET.

1.3.3 Key Terms

- **Member -** Replaces the term "Recipient". A Member represents an individual enrolled in any of the ForwardHealth health care programs in iC.

- **Member ID -** All members are assigned an ID. This number will replace the old MA ID number. The number is assigned from the Master Client Index (MCI) and will no longer include the SSN.
- **Benefit Plan** -Type of plan that designates the benefits covered and is based on the member's medical status code. Members may be enrolled in multiple benefit plans concurrently.
  - Example: SeniorCare and QMB.
  - Example: QMB and EBD Medicaid.
- **Enrollment -** Replaces the term "eligibility". Enrollment is used anytime a reference is made to a member who is eligible. A member may also be enrolled in a Managed Care program.
- **Fiscal Agent –** EDS-HP is the fiscal agent for the Wisconsin Medicaid and ForwardHealth Programs.

2 Getting Started

2.1.1 Passwords & Security

ForwardHealth Partner Portal

General Password guidelines

- All portal users can change their password at any time. After logging in, you can click on the **Account** link on the secure Partner home page and then click the **Change Password** link on the Account home page.
- Portal account passwords expire every 60 days and users are prompted to change them.
- The password you create **MUST** have at least **eight** characters.
- Passwords must contain at least one **uppercase** letter, one **lowercase** letter, and one **number**.
- Passwords must not contain your real name or user name.
- When resetting your password, you cannot use any of your previous eight passwords.
- If you forgot your password, you can reset it yourself by answering security questions you will be asked to provide when you change the initial password you receive.

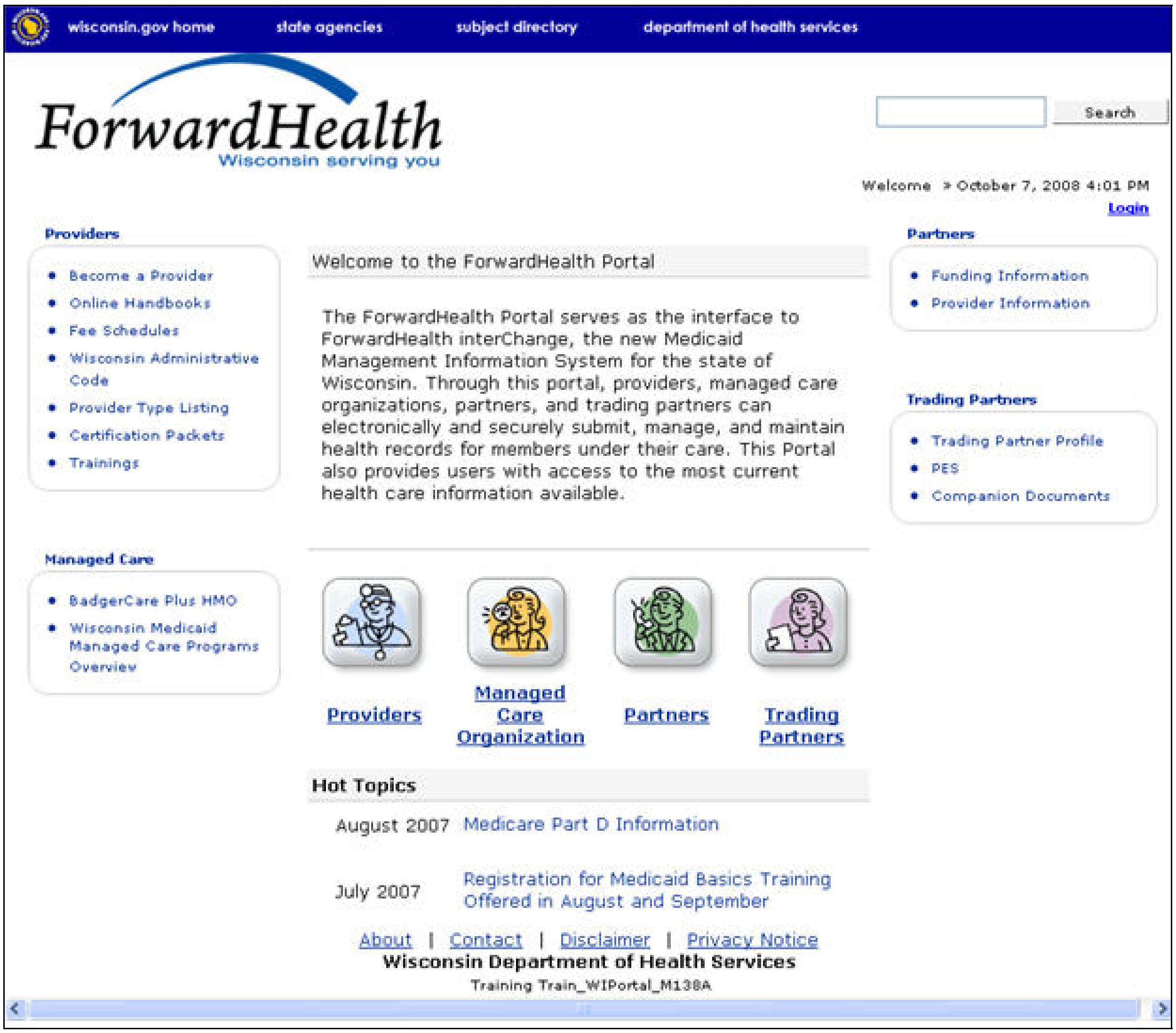
ForwardHealth interChange Password Problems

- For assistance with interChange password problems, please contact EDS Technical Support @ 221-4746, ext. 80551 or email VEDSTechSupport@wisconsin.gov.

3 ForwardHealth Partners Home Panel

Step	Action	Response
1.	Click the portal icon on your desktop, or enter https://www.forwardhealth.wi.gov/ in the address bar in Internet Explorer, and click **Go**.	The public portal Home page displays.

ForwardHealth Main Portal Home Page Screen Graphic



ForwardHealth Main Portal Home Page Screen Description

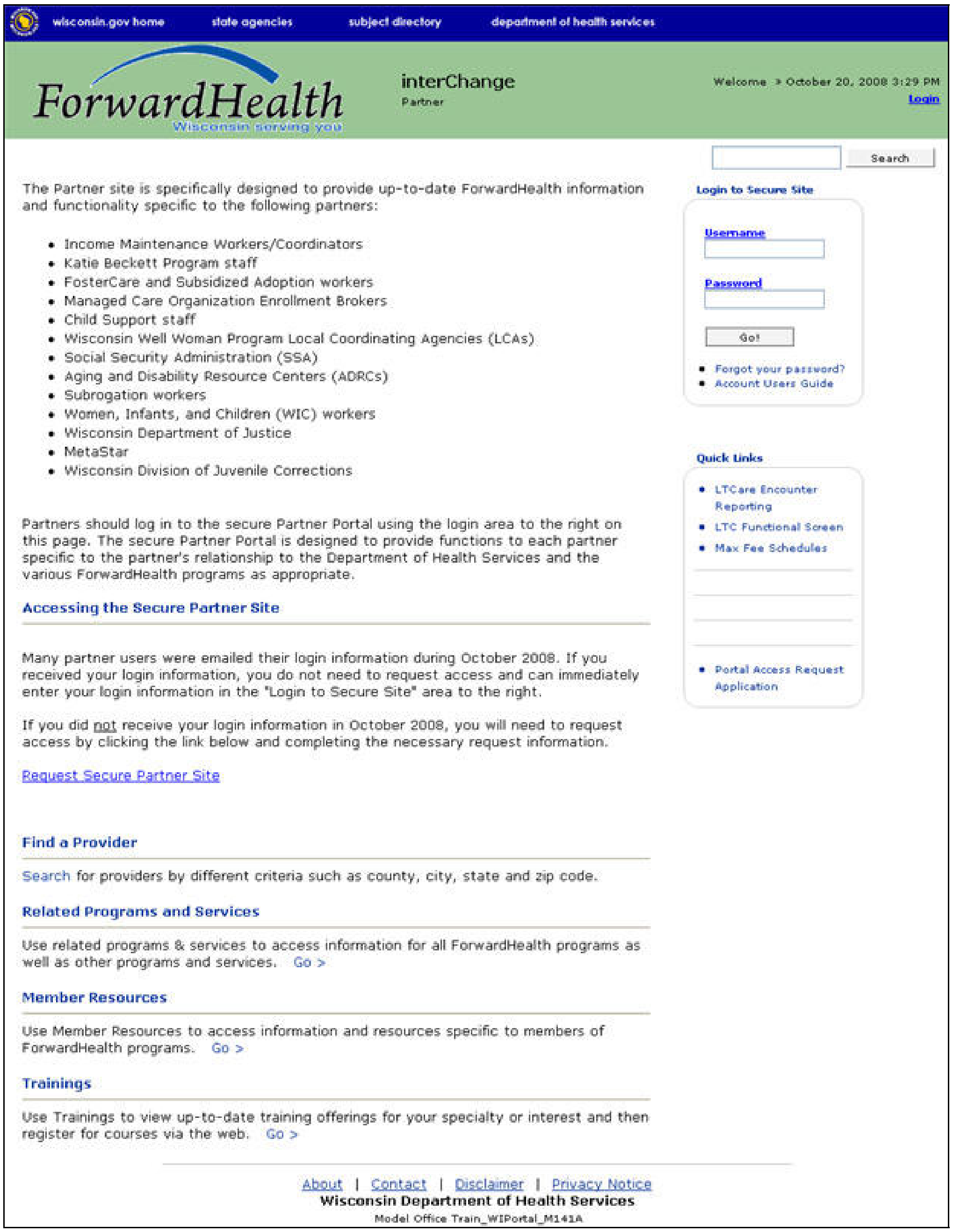
- As you can see, the **ForwardHealth Portal** is divided into four main areas as indicated by the four icons in the middle of the page. Users can click on an icon, or the link below the icon, to go to that area of the portal.

- Today we are focusing on the secure Partner portal for Child Support Workers.

3.1 Access the Partner Portal

Step	Action	Response
1.	Click the **Partners** icon.	The **Partners** public portal home page displays.

Partners Home Page Graphic



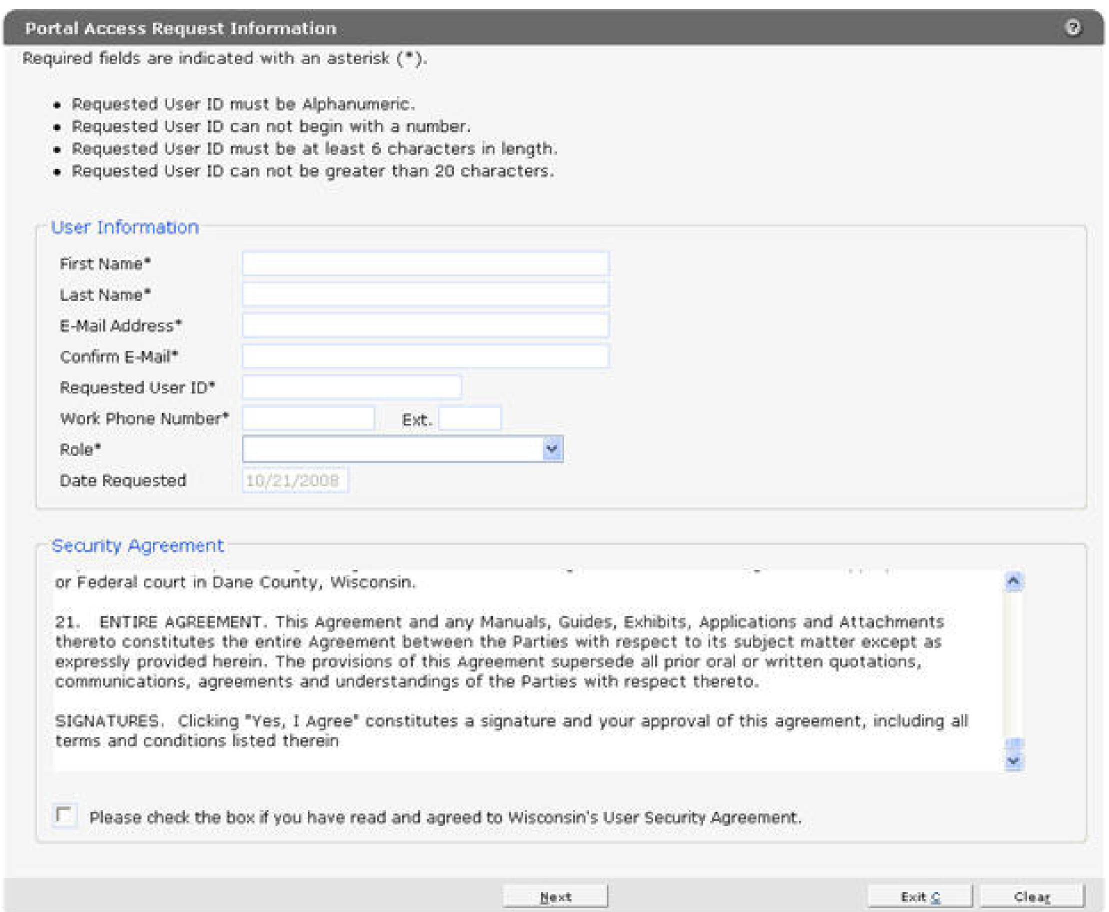
Partners Home Page Description

- As you can see, this screen provides links to some basic information that can be accessed by users who are not logged in, such as finding a provider and contact information for Members interested in applying for BadgerCare Plus benefits.
- On the left of the screen are text entry fields where users can enter their login information for access to the Partner secure site.
- If you received your login information, you do not need to request access and can immediately enter your login information in the **"Login to Secure Site"** area to the right.
- If you did **not** receive your login information, you will need to request access by clicking the **Request Secure Partner Site** link and completing the necessary request information.

3.2 Request Secure Partner Site

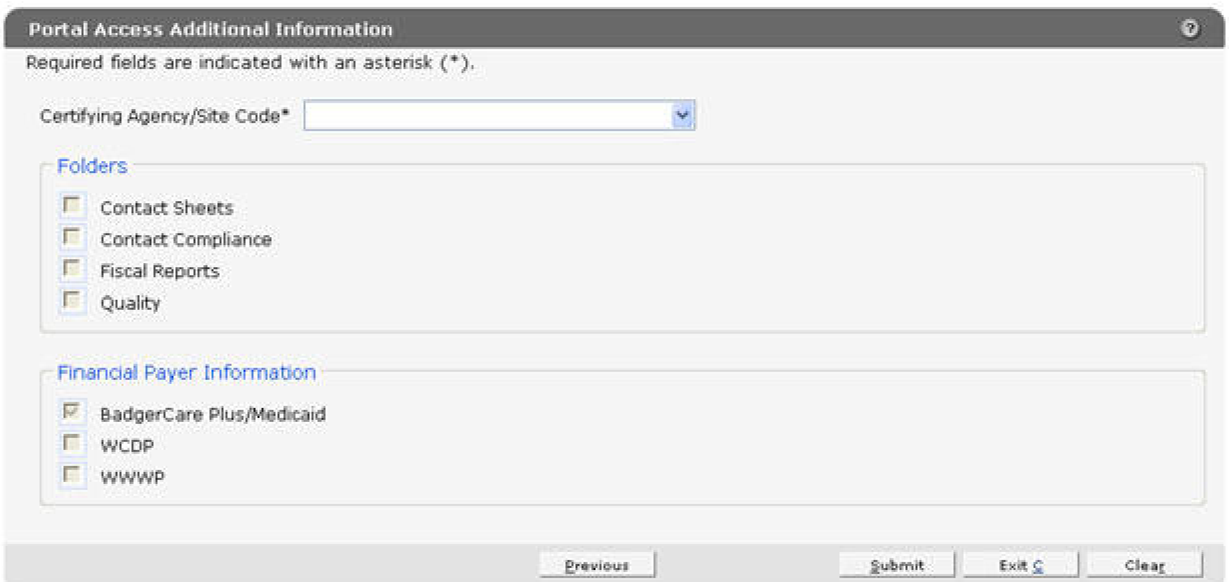
Step	Action	Response
1.	From **Partners** public portal home page, click **Request Secure Partner Site**.	The **Portal Access Request Information** panel displays.

Portal Access Request Information Graphic



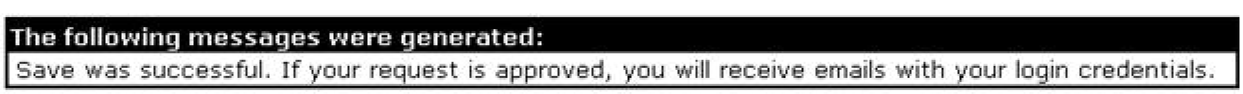
Step	Action	Response
2.	Enter the requested information in all fields. All fields must be filled out.	
3.	Read the Security Agreement and check the box at the bottom of the screen to confirm that you read the agreement and agree to the conditions.	
4.	Click **Next**.	The Portal Access Additional Information screen displays.

Portal Access Additional Information



Step	Action	Response
3.	Use the drop-down menu at the top of the screen to select your Site Code.	
4.	Click **Submit**.	If there are no problems with the request, a confirmation message will display above the panel. If there is a problem with the request, an error message will display.

Confirmation Message



- **Note that if your request is approved, you will receive emails with your login credentials.**

3.3 Log into the Partner Portal

Step	Action	Response
1.	Enter your user name in the **Username** field.	
2.	Enter your password in the **Password** field.	
3.	Click **Go.**	The Partners secure page displays

ForwardHealth Partner Home Page Graphic

ForwardHealth Partner Home Page Screen Description

- Through the Partner portal, users can access the following functions:
  - Enrollment verification.
  - Account management.
  - Member maintenance
- Also available in quick links that appear on the right of the screen is:
  - **Total Benefits Paid By Medicaid** –
- One of the features of the portal to help you track where you are is the navigation map, which is at the upper left of the screen, beginning with the Partners graphic:

- The link shows you which area of the secure portal site you are in, along with what tab or link you've clicked. You can also click on either the graphic or any of the links displayed after the graphic (e.g. **Partners**).
- Notice there are tabs along the top of this page, with Partners automatically selected:
  - **Home** - Is the public portal Home page
  - **Search** - Lets you search for information using a keyword.
  - **Partners** – Takes you to the Partners secure home page.
  - **Enrollment** — Lets you search for a member's summary enrollment data.
  - **Account**— Lets you update the information associated with your Username and Password. You can set up, update and maintain account login credentials, change/reset passwords, assign roles for authorized employees, and read and manage messages pertaining to your account, such as your email.

***Note**: The Account tab let's you manage your account. Although we don't discuss this information in detail, there is a detailed user guide (the Account User Guide link) in PDF format for you to use if you need to change any of your account information.*

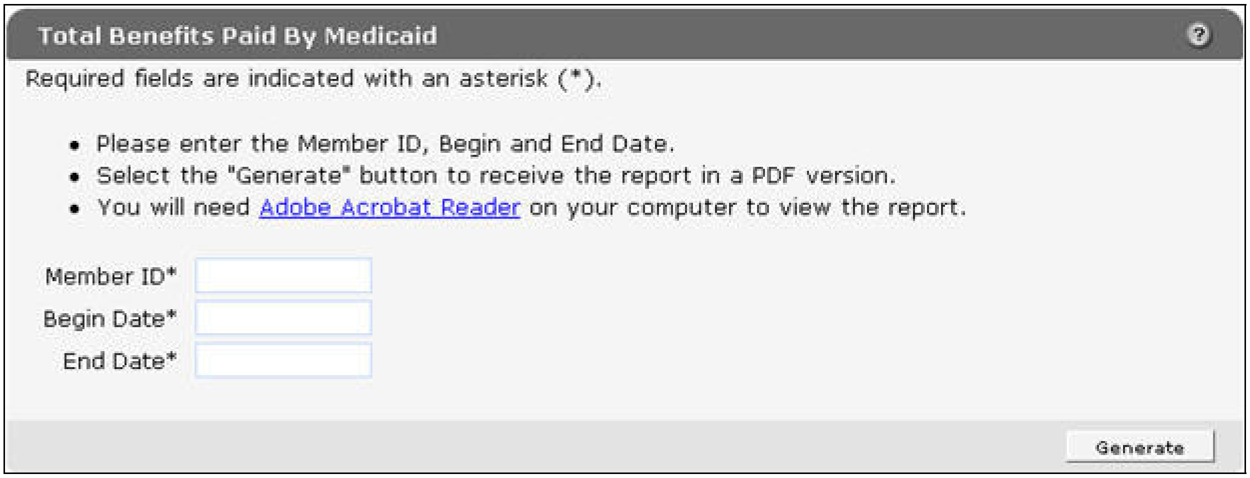
  - **Contact Information** — allows you to contact ForwardHealth with questions about the ForwardHealth programs and the Partner Portal.
  - **Site Map**—Shortcut links to the main topics on the Partners portal.
  - **iC Functionality**—Lets you access more detailed member information from interChange.

***Note**: You may notice that each time you click a tab, or move from screen to screen, you see the "this site contains secure and non-secure…" message. Click **Yes** to continue, if you see this screen. The message appears if your security level for your Internet is set to prompt you whenever you are about to display non-secure information, which you can change through Internet options, security.*

3.3.1 Total Benefits Paid By Medicaid

Step	Action	Response
1.	In the Quick Links panel on the secure partner home page, click **Total Benefits Paid By Medicaid**.	The **Total Benefits Paid By Medicaid** page displays.

Total Benefits Paid By Medicaid



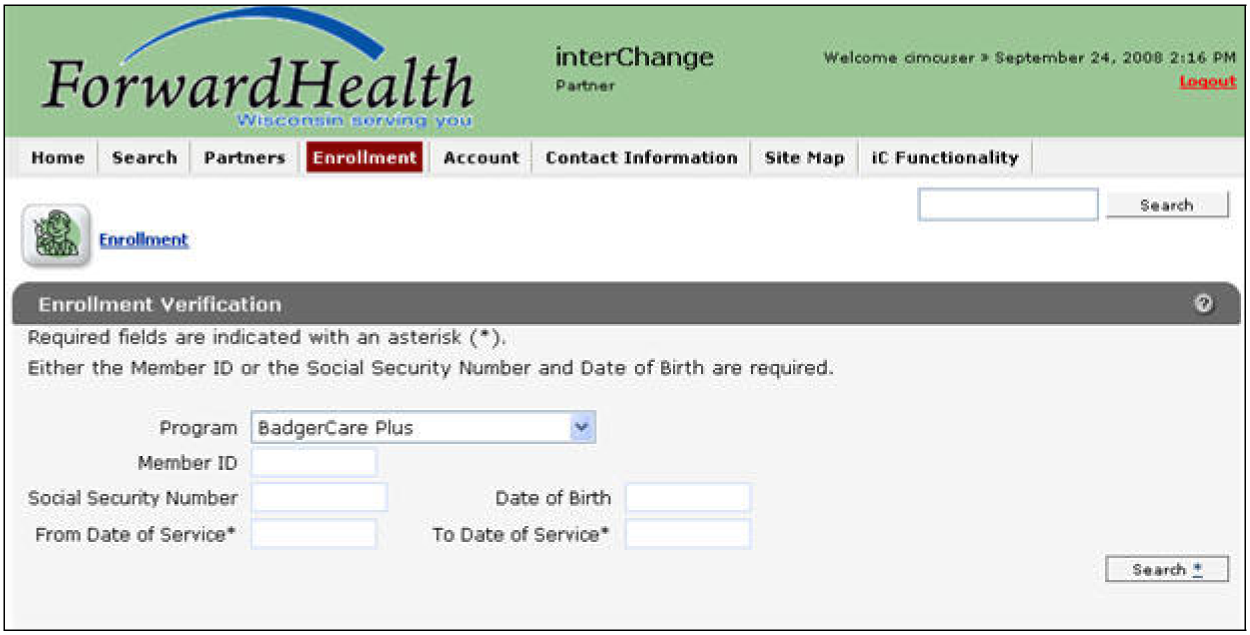
Step	Action	Response
2.	Enter a valid **Member ID** number.	
3.	Enter a **Begin Date**.	
4.	Enter an **End Date**.	
5.	Click **Generate**.	A PDF document will open in a separate window with the selected information.

4 Enrollment Verification

Users can check a member's eligibility using the Enrollment Verification panel in the Enrollment section of the Secure Partner web.

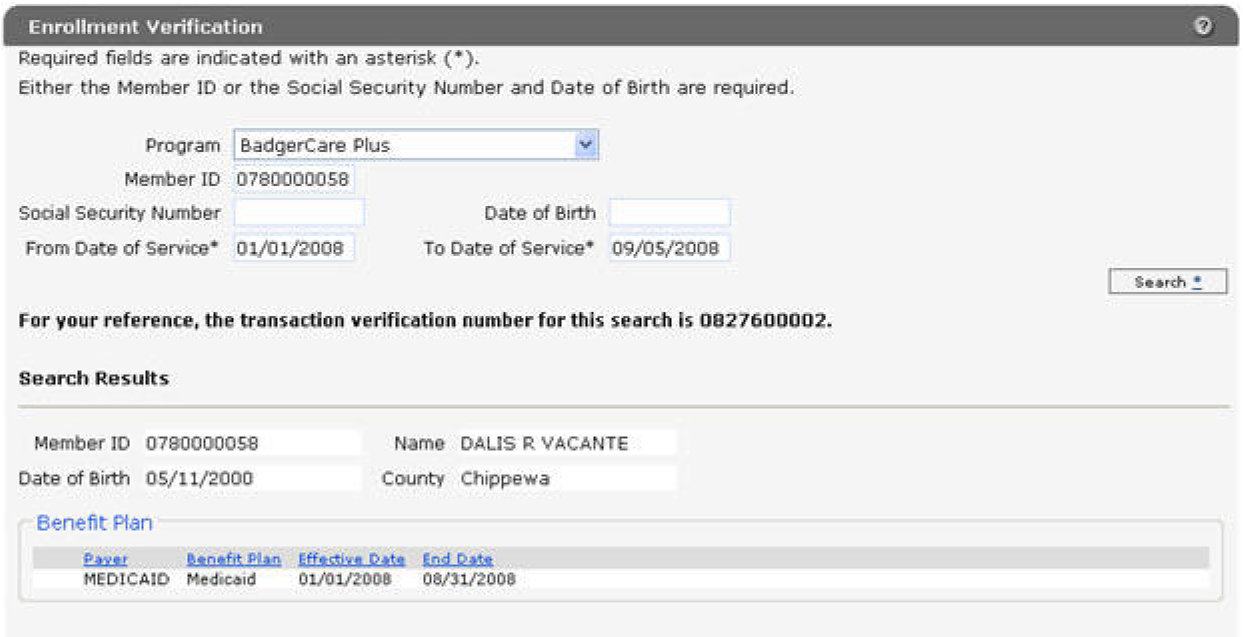
Step	Action	Response
1.	From the Partner main menu at the top of the page, click **Enrollment**.	The Enrollment Verification panel displays.

Enrollment Verification Panel Graphic



Step	Action	Response
1.	Select the program for which you want to certify eligibility from the **Program** drop-down menu.	
2.	Enter either the **Member ID**, or the member's **Social Security Number** and **Date of Birth**.	
3.	Enter the **From Date of Service** and **To Date of Service**, which are required fields.	
4.	Click **Search**.	The panel refreshes with the Member's eligibility information.

Enrollment Verification Graphic



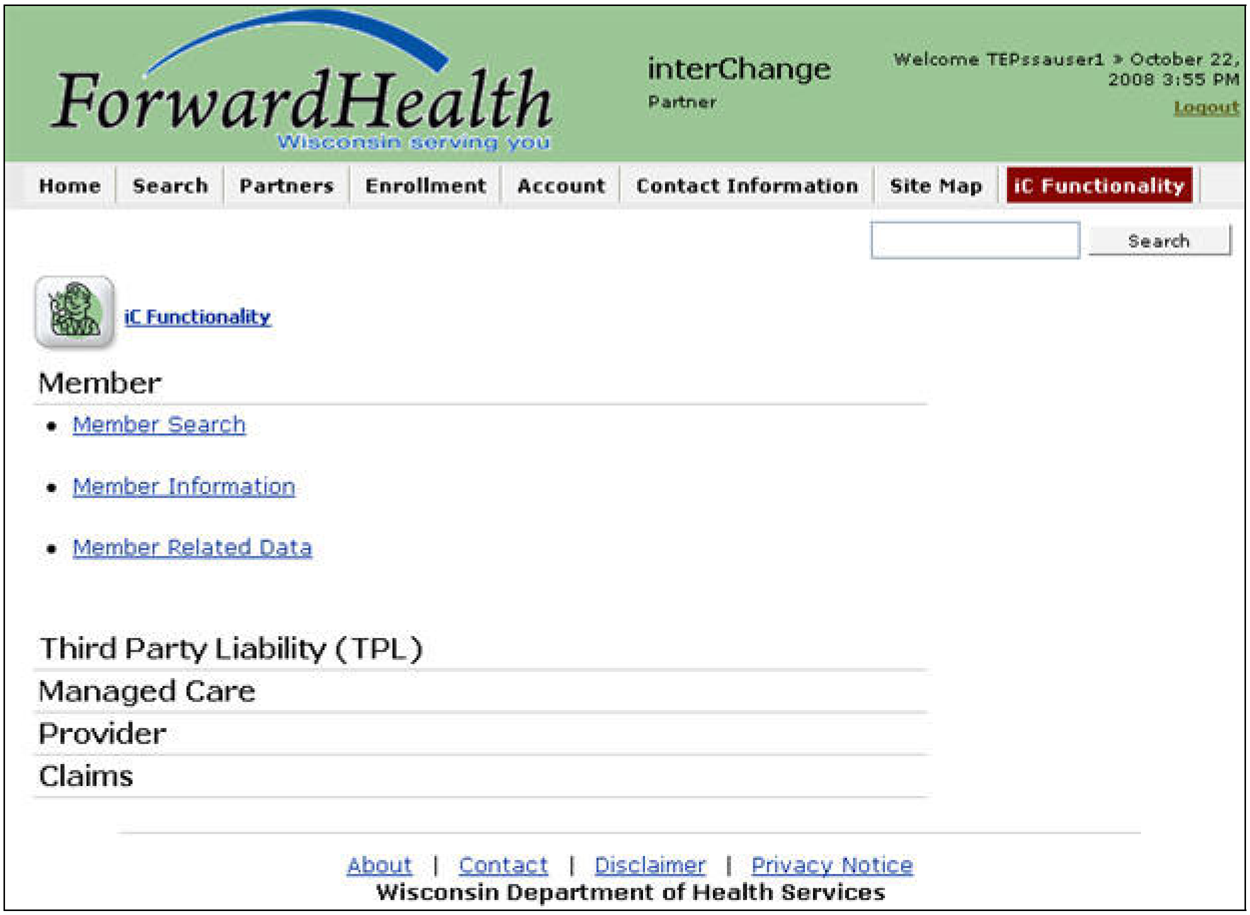
- The results show the Financial Payer, Benefit plan, and Medicare coverage if any, and the effective and end dates of the plans.
- If there is no coverage for the member, a message will display.

5 iC Functionality

This section shows users how to access interChange information via the secure Partner Portal.

Step	Action	Response
1.	Click the **iC Functionality** tab.	A list of information panels users can access from interChange displays.

iC Functionality Graphic



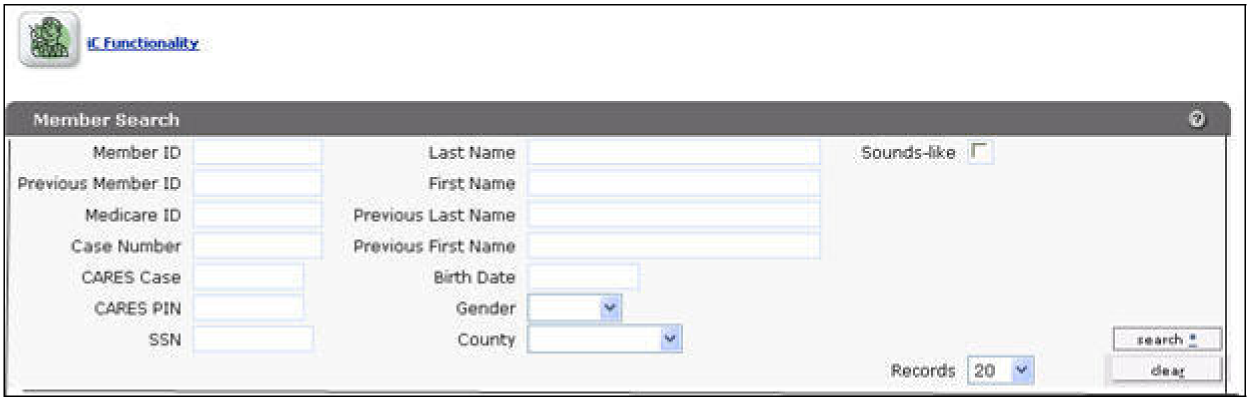
- Let's start with Member iC Functionality.

5.1 Member

5.1.1 Member Search

Step	Action	Response
1.	From the list of iC Functionality links, click **Member Search**.	The **Member Search** panel displays.

Member Search Panel Graphic



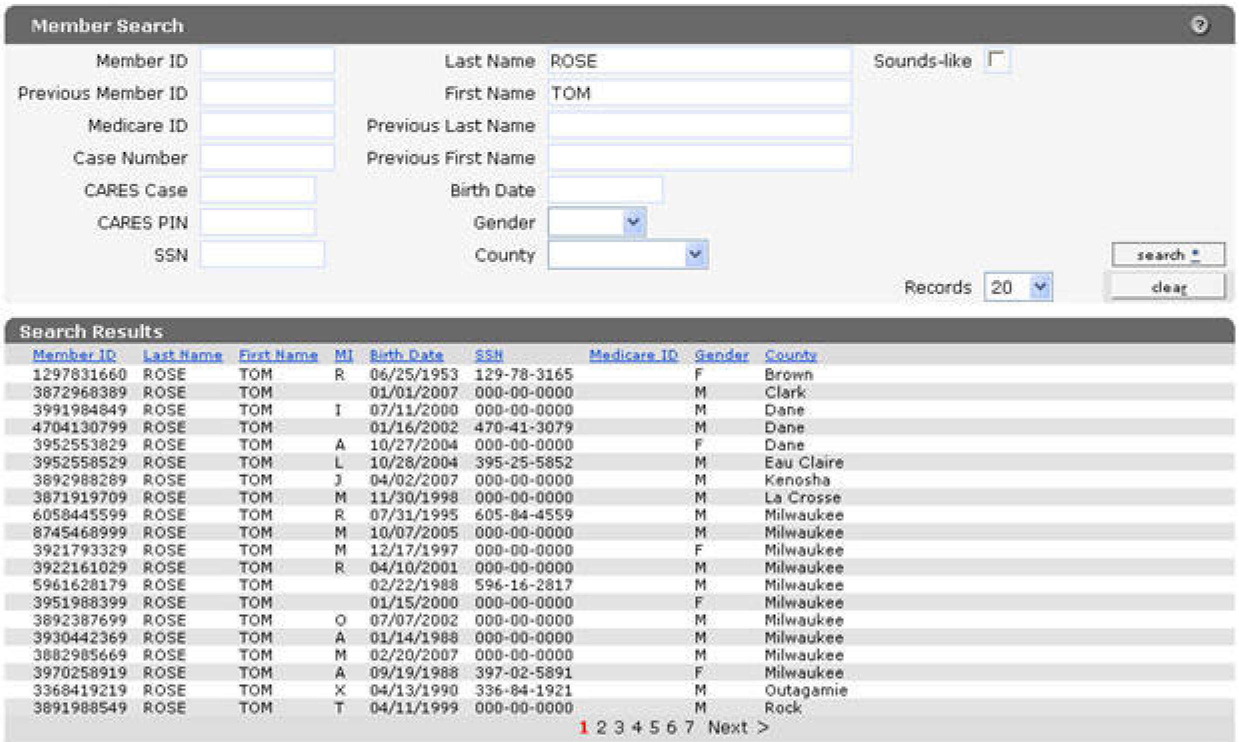
Member Search Panel Description

- This panel allows you to search for a member using any of the fields displayed.
- Once you have entered information in the fields, click **Search** to initiate the search. Clicking the **Clear** button clears the information from all the fields.
- If searching by Member ID and the record is not found. Enter the ID in the Previous Member ID field in case the member's ID has changed.
- The **Sounds-like** checkbox on this panel can be used when you are searching by a member's name and are not sure of the correct spelling. Clicking the **Sounds-like** check box performs a phonetic search on the information contained in the last name field.
- To narrow down the results of your search, enter as much information about the member as possible.
- The **Records** drop-down is used to set the maximum number of records per page that are returned.

Search for a Member Record Using a Member's Name

Step	Action	Response
1.	Enter the member's last name in the **Last Name** field.	
2.	Enter the member's first name in the **First Name** field.	
3.	Click **Search**.	The **Search Results** panel displays.

Member Search Results Panel Graphic



Member Search

Member ID		Last Name	ROSE	Sounds-like	
Previous Member ID		First Name	TOM		
Medicare ID		Previous Last Name			
Case Number		Previous First Name			
CARES Case		Birth Date			
CARES PIN		Gender			
SSN		County			search
				Records 20	clear

Search Results

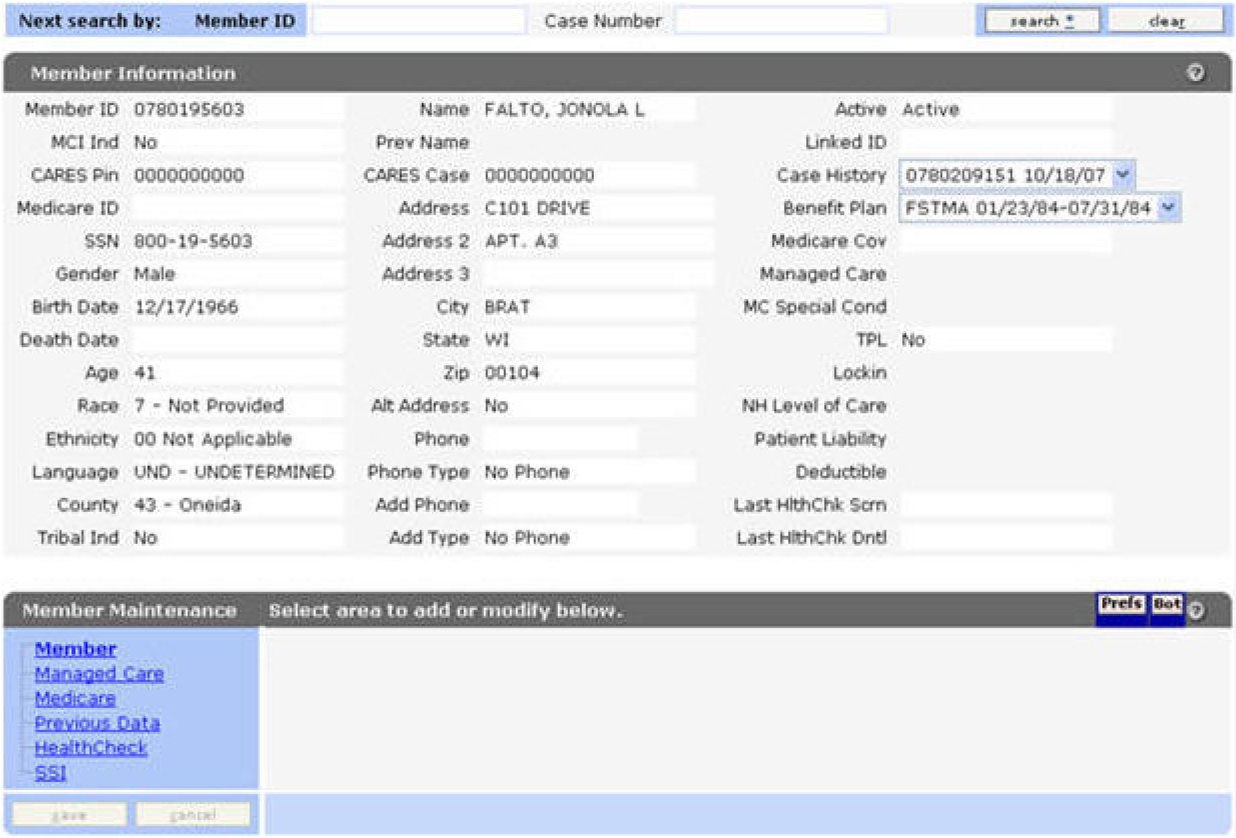
Member ID	Last Name	First Name	MI	Birth Date	SSN	Medicare ID	Gender	County
1297831660	ROSE	TOM	R	06/25/1953	129-78-3165		F	Brown
3872968389	ROSE	TOM		01/01/2007	000-00-0000		M	Clark
3991984849	ROSE	TOM	I	07/11/2000	000-00-0000		M	Dane
4704130799	ROSE	TOM		01/16/2002	470-41-3079		M	Dane
3952553829	ROSE	TOM	A	10/27/2004	000-00-0000		F	Dane
3952558529	ROSE	TOM	L	10/28/2004	395-25-5852		M	Eau Claire
3892988289	ROSE	TOM	J	04/02/2007	000-00-0000		M	Kenosha
3871919709	ROSE	TOM	M	11/30/1998	000-00-0000		M	La Crosse
6058445599	ROSE	TOM	R	07/31/1995	605-84-4559		M	Milwaukee
8745468999	ROSE	TOM	M	10/07/2005	000-00-0000		M	Milwaukee
3921793329	ROSE	TOM	M	12/17/1997	000-00-0000		F	Milwaukee
3922161029	ROSE	TOM	R	04/10/2001	000-00-0000		M	Milwaukee
5961628179	ROSE	TOM		02/22/1988	596-16-2817		M	Milwaukee
3951988399	ROSE	TOM		01/15/2000	000-00-0000		F	Milwaukee
3892387699	ROSE	TOM	O	07/07/2002	000-00-0000		M	Milwaukee
3930442369	ROSE	TOM	A	01/14/1988	000-00-0000		M	Milwaukee
3882985669	ROSE	TOM	M	02/20/2007	000-00-0000		M	Milwaukee
3970258919	ROSE	TOM	A	09/19/1988	397-02-5891		F	Milwaukee
3368419219	ROSE	TOM	X	04/13/1990	336-84-1921		M	Outagamie
3891988549	ROSE	TOM	T	04/11/1999	000-00-0000		M	Rock

1 2 3 4 5 6 7 Next >

- If there was more than one member that meets the entered criteria, the list of members matching the entered criteria displays on the **Search Results** panel.
- Columns display for each record found in the search. You can click on a column heading to sort your results. Clicking a column once will sort the results in ascending order by that column. Clicking the column a second time sorts them in descending order.
- Selecting a row will populate the member information panel.

Step	Action	Response
3.	Click on the row you wish to view.	The **Member Information** panel displays.

Member Information Panel Graphic



Member Information Panel Graphic

- The **Member Information** page is comprised of three separate panels including:
  - The mini-search panel that allows you to search for a new member record using a Member ID or Case Number.
  - The **Member Information** panel, located in the middle of the page, displays basic information about the member.
  - The **Member Maintenance** navigation panel, located at the bottom of the page is the access point for panels that contain more detailed member data. Let's take a look at the information on the **Member Information** panel.

5.1.2 Member Information Panel

Step	Action	Response
1.	Enter a valid Member ID in the **Member ID** field in the Search panel.	
2.	Click **Search**.	The information page for that Member ID displays.

***Note**: You no longer have the ability to change the ID number of a member (the old Cert 5s) through the portal or any other means. Member ID number change requests must be called into EDS-HP, See **Contact Information** at the end of the training guide.*

Member Information Panel Graphic

Member Information

Member ID	0780195603	Name	FALTO, JONOLA L	Active	Active
MCI Ind	No	Prev Name		Linked ID	
CARES Pin	0000000000	CARES Case	0000000000	Case History	0780209151 10/18/07
Medicare ID		Address	C101 DRIVE	Benefit Plan	FSTMA 01/23/84-07/31/84
SSN	800-19-5603	Address 2	APT. A3	Medicare Cov	
Gender	Male	Address 3		Managed Care	
Birth Date	12/17/1966	City	BRAT	MC Special Cond	
Death Date		State	WI	TPL	No
Age	41	Zip	00104	Lockin	
Race	7 - Not Provided	Alt Address	No	NH Level of Care	
Ethnicity	00 Not Applicable	Phone		Patient Liability	
Language	UND - UNDETERMINED	Phone Type	No Phone	Deductible	
County	43 - Oneida	Add Phone		Last HlthChk Scrn	
Tribal Ind	No	Add Type	No Phone	Last HlthChk Dntl	

Member Information Panel Description

- The left section of the **Member Information** panel displays a high-level snapshot of a member's information at the time the page is accessed, including CARES PIN, SSN, gender, date of birth, age, etc.
  - The **MCI Indicator** field is a **Yes** or **No** field that indicates if the member ID is an MCI ID. If 'No', the member ID is a pseudo ID.
- The middle section of the Member Information panel displays address information and other demographic data about the member, including any previous name, if applicable. The address displayed is the member's mailing address.
- The right side of the Member Information panel contains more fields that require some additional explanation.
  - The **Active** field on the Member Information page pertains to the member ID, not enrollment. It indicates the member had two separate IDs and the two IDs are linked keeping one "Active" (Active Field=Yes) and the other "Inactive" (Active Field=No). The **Linked ID** field displays information if the member has another ID that is linked to their present ID.
  - The **Case History** field uses a drop-down menu to identify the case head member ID numbers and dates for cases the member is/was associated with.
  - The **Benefit Plan** field also has a drop-down menu that displays the benefit plans in which a member is/was enrolled. The field includes a benefit plan code and the effective dates of each plan.
  - The **Medicare Coverage** field contains the member's current Medicare coverage if **active**. It is blank if the member does not have active coverage. The field can show one or more of the following:

- **A** for **Medicare Part A**, which is hospital insurance that pays for inpatient hospital stays, care in a skilled nursing facility, hospice care and some home health care.
- **B** for **Medicare Part B**, which is medical insurance that helps pay for physician services, outpatient hospital care, durable medical equipment, and some medical services that are not covered by Part A
- **D** for **Medicare Part D**, which is prescription drug coverage.

Note: *IC now captures information about Medicare Part A and B. Part D Medicare prescription drug is also captured separately here.*

More information on Medicare Enrollment Database (EDB) maintained by the Center for Medicare and Medicaid (CMS) which contains the Part A and B entitlement start date and entitlement status can be found in the next section. This information is made available for those who are interested but this training session will not go into more detail.

- The **Managed Care Plan** field shows the plan and effective dates if the member is enrolled in a Managed Care Plan.
- If applicable, the **MC Special Condition** field displays the member's Managed Care Level of Care if enrolled in long term care managed care program, and/or enrollment exemption codes and the corresponding effective/end dates.
- Similarly, the **TPL** (Third Party Liability) field will be populated with "yes" if the member has active third party insurance coverage,
- The **Lockin** field will be populated if a punitive restriction has been placed against the member, or if the member is enrolled in a hospice program. If a Lockin is in effect, an indicator with effective dates will populate the field.
- The **NH Level of Care** field is used to display nursing home level of care codes.
- The **Patient Liability** field designates the monthly institutional liability or waiver cost share amounts the member must contribute to their cost of care, along with the effective and end dates of the liability.

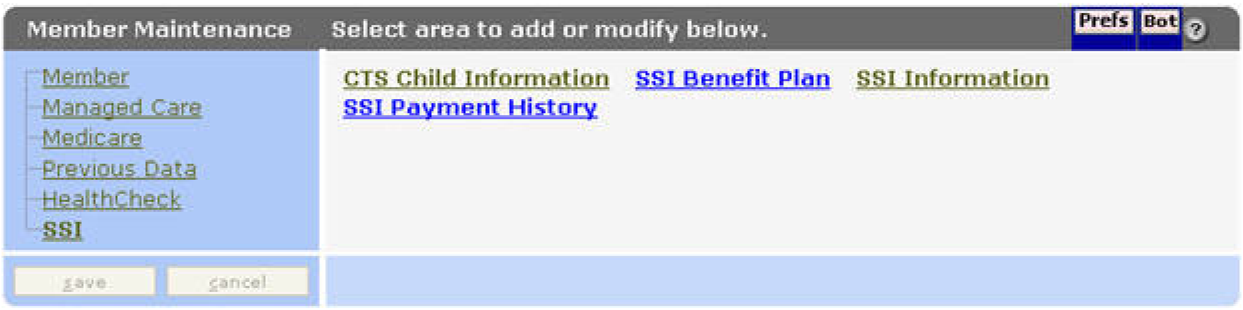
Note: *The patient liability panel will include patient liability as well as the Waiver and Family Care cost share. Patient liability and Waiver/FC cost share have now been automated to interface with IC.*

- **Deductible** indicates the member's current SeniorCare deductible and effective/end dates. This field does not apply to private insurance.
- The **Last Health Check Screening** field shows the date of the member's last medical screening.
- The **Last Health Check Dental** field below it displays the date of the member's last dental screening.

5.1.3 Member Maintenance – SSI Links

Step	Action	Response
1.	Using the Member ID scroll down to the **Member Maintenance** navigation panel.	
2.	On the left of the **Member Maintenance** panel, click **SSI**.	The **SSI** links display in the right pane.

Member Maintenance – Member Navigation Panel Graphic



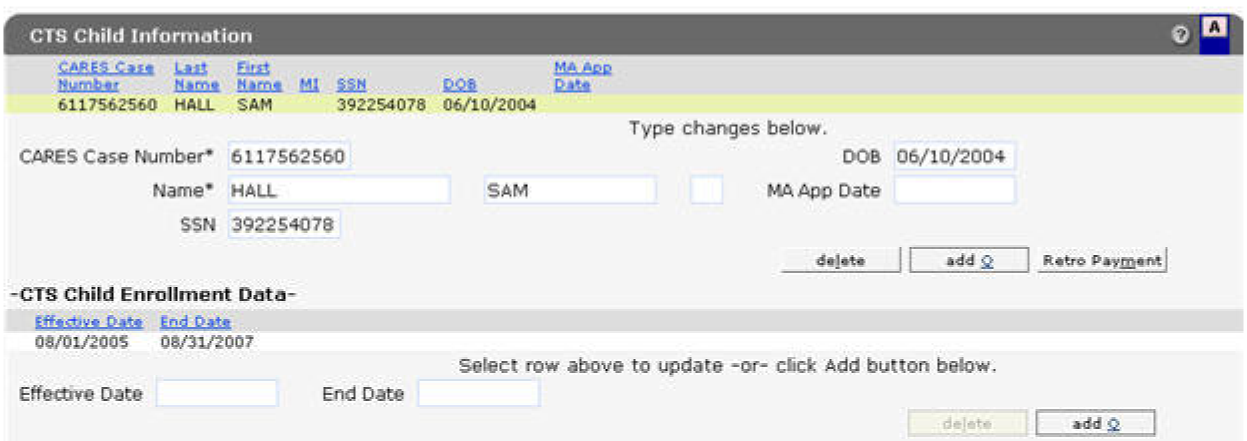
Member Maintenance – Member Navigation Panel Description

- The **Member Maintenance** navigation panel displays six different areas of detailed information for a member. Those areas are on the left side of the panel. Clicking one of the categories displays links on the right side of the panel where authorized users can access information. SSI staff only have access to links in the SSI area.

CTS Child Information

Step	Action	Response
1.	In the **Member Maintenance – SSI** panel, click **CTS Child Information**.	The **CTS Child Information** panel displays.

CTS Child Information Panel Graphic



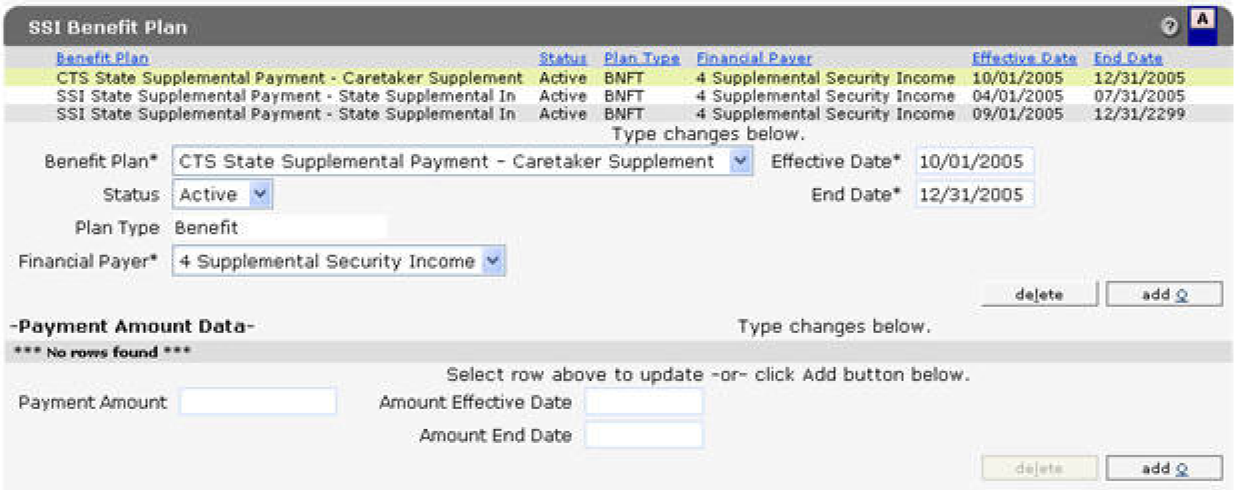
CTS Child Information Panel Description

- The **CTS Child Information** panel is used to display and update Caretaker Supplement Child information.
- Let's take a look at some of the fields on this panel:
  - Most of the identification on this page such as the **Name** and **Date of Birth** refers to the eligible child.
  - The **SSN** field displays the child's Social Security Number.
  - **MA App Date** is the date of the child's Medicaid Application. This is the payment cycle date when a child is added to an existing CTS monthly detail.
  - On the CTYS Child Eligibility Data section of the panel, the **Eligibility Effective** and **End Dates** show the time period when the child is eligible for Caretaker supplemental payment.
  - The **Retro Payment** button on the bottom right of the panel shows or hides the Retro payment sub panel.
- Retroactive payments are payments that can be requested for eligible children for months prior to when CTS benefits are applied for. Local agency workers can use the CARES system to determine eligibility for CTS back to January 1998 as long as the parent had requested public assistance and had an open assistance case in the CARES system for each month of CTS retroactivity.
- On the Retro Payment Request Data section of the panel:
  - The **Status** field displays the status of the retro payment, which could be New or Processed.
  - The **Retro Effective** and **End Date** fields show the first and last date the child is eligible for retro payments.
  - The **Monthly Amount** field displays the eligible child's monthly retro payment amount. Caretaker Supplement benefits are $250 per month for the first eligible child and $150 per month for each additional eligible child.
  - The **Total Amount** shows the total dollars paid to the parent. It is calculated based on the effective and end date range, and the monthly payment amount.

SSI Benefit Plan Panel

Step	Action	Response
1.	In the **SSI** panel, click **SSI Benefit Plan**.	The **SSI Benefit Plan** panel displays.

SSI Benefit Plan Panel Graphic



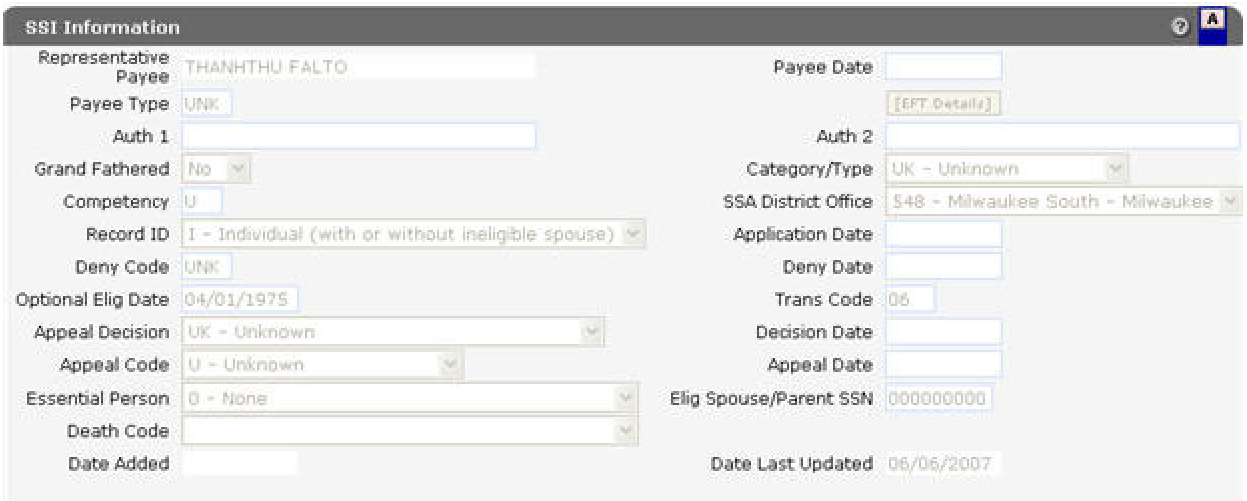
SSI Benefit Plan Panel Description

- The **SSI Benefit Plan** Panel is used to display and update SSI Benefit information, such as the kind of SSI Benefit received. Most of the fields will be familiar, but we'll mention a couple.
  - The **Benefit Plan** field shows the SSI Benefit Plan for which the Member is eligible.
  - The **Status** field displays the Status code for the particular segment of program eligibility. If the field is blank it means the Member's eligibility is in an active status. "**G**" signifies Guaranteed Eligibility, and an **'H'** means that the segment is history and no longer valid.
  - **Plan Type** shows the type of SSI Benefit Plan, such as Benefit or Assignment.
  - The **Effective and End Date** fields display the time period the payment amount is in effect.
- In the **Payment Amount Data** section of the panel:
  - The **Payment Amount** reflects the amount of a payment issued by the Financial system, such as a check or EFT transaction.
  - The **Amount Effective** and **End Dates** show the beginning and end dates the Payment Amount applies to.

SSI Information Panel

Step	Action	Response
1.	In the **Member Maintenance – SSI** panel, click **SSI Information**.	The **SSI Information** panel displays.

SSI Information Panel Graphic



Member SSI Information Description

- The **SSI Information** Panel is used to display the SSI information for a Member.
  - The **Representative Payee** field displays the payee name, if the Member is assigned a representative payee.
  - Across from that, the **Payee Date** field displays the date the current representative payee became effective.
  - The **Payee Type** is a code that represents one of a broad category of entities receiving payment for goods and/or services from the State Financial system, such as a provider, Member, county, or carrier.
  - If information is entered in the **Auth 1** field, it indicates that a Member/payee has requested that someone other than himself/herself may call and obtain information regarding their SSI benefits. A Member can authorize up to two persons to be authorized representatives. If there are two names, the second will appear in the **Auth 2** field.
  - If the **Grand Fathered** field displays a **"Yes"**, this indicates that the Member is grandfathered into the State SSI program and is eligible for **only state** benefits. A **"No"** indicated that the member is a State/Federal SSI Member and is eligible for **state and federal** benefits.
  - The **Competency Code** field contains a one letter code that identifies the representative payee's status as to legal guardianship and/or competency of the Member. In all cases, the Member is considered competent; an **"A"** means the Member has a representative payee. **"B"** indicates that the Member has no legal guardian, and a **"C"** means the legal guardian is someone other than the representative payee.

- The **Record ID** identifies the living arrangement of the Member.
- If populated, the **Deny Code** indicates the reason why the Member was denied SSI.
- The **Optional Eligibility Date** field displays the optional eligibility date, if applicable.

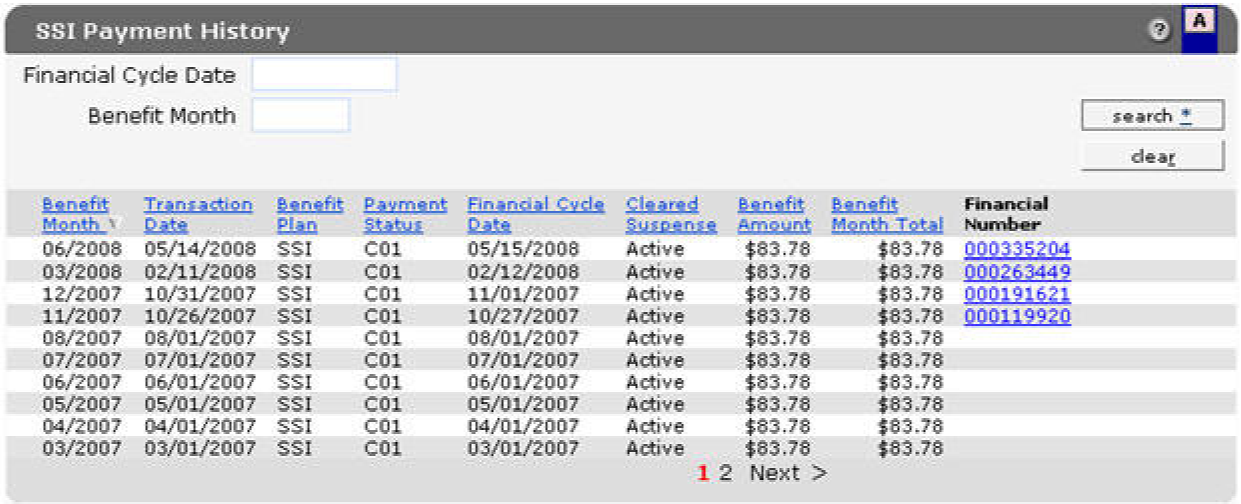
***Note: Optional Eligibility** - means that States may use more liberal income and resources methodologies to determine Medicaid eligibility for certain AFDC-related and aged, blind, and disabled individuals under Sections 1902®(2) and 1931 of the Social Security Act.*

- The **Appeal Decision Code** indicates the appeal decision
- Across from that, the **Decision Date** shows the date the appeal decision was made
- The **Appeal Code** indicates the level of appeal and the latest action.
- And under that, the **Appeal Date** displays the date of an appeal when an appeal code is present
- The **Essential Person** indicates if a Member has an essential person, which is someone who was identified as essential to a Member's welfare under a State program that preceded the SSI program.
- The **Death Code** field indicates the source for the date of death.
- Across the panel, the **Deny Date** shows the denial date when a denial code is present.
- The **Date Added** is the date the Member SSI Information was added to the record.
- The **Category/Type** field contains the Member Type Code and description. These can be: **AI**-aged individual, **AS**-aged spouse, **BI**-blind individual, **BC**-blind child, **DI**-disabled individual, **DS**-disabled spouse, **DC**-disabled child, or **EP**-essential person.
- The **SSA District Office** field shows the SSA District Office for the SSI Member.
- The **Application Date** is the date the Member filed for SSI benefits.
- The **Trans Code** indicates the type of transaction being made to the Member's file. The codes are maintained in the **Related Data>Codes** section of Member.
- The **Eligible Spouse/Parent SSN** field displays the social security number of an SSI eligible spouse or parent.
- **Date Last Updated** is the date the Member SSI Information was last updated.

SSI Payment History Panel

Step	Action	Response
1.	In the **Member Maintenance – SSI** panel, click **SSI Payment History**.	The **SSI Payment History** panel displays.

SSI Payment History Panel Graphic



SSI Payment History

Financial Cycle Date

Benefit Month

search

clear

Benefit Month	Transaction Date	Benefit Plan	Payment Status	Financial Cycle Date	Cleared Suspense	Benefit Amount	Benefit Month Total	Financial Number
06/2008	05/14/2008	SSI	C01	05/15/2008	Active	$83.78	$83.78	000335204
03/2008	02/11/2008	SSI	C01	02/12/2008	Active	$83.78	$83.78	000263449
12/2007	10/31/2007	SSI	C01	11/01/2007	Active	$83.78	$83.78	000191621
11/2007	10/26/2007	SSI	C01	10/27/2007	Active	$83.78	$83.78	000119920
08/2007	08/01/2007	SSI	C01	08/01/2007	Active	$83.78	$83.78	
07/2007	07/01/2007	SSI	C01	07/01/2007	Active	$83.78	$83.78	
06/2007	06/01/2007	SSI	C01	06/01/2007	Active	$83.78	$83.78	
05/2007	05/01/2007	SSI	C01	05/01/2007	Active	$83.78	$83.78	
04/2007	04/01/2007	SSI	C01	04/01/2007	Active	$83.78	$83.78	
03/2007	03/01/2007	SSI	C01	03/01/2007	Active	$83.78	$83.78	

1 2 Next >

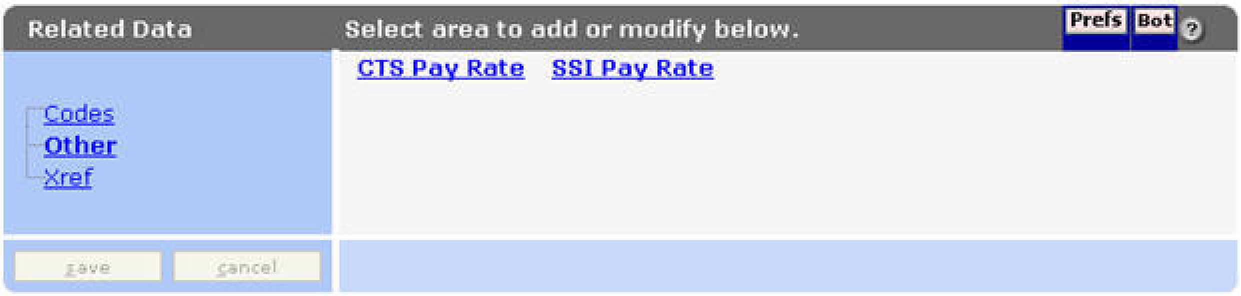
SSI Payment History Description

- The **SSI Payment History** panel is used to display SSI Payment information for the Member by benefit plan. Narrow the search down to a specific date using the **Transaction Date** search field. Let's take a look at some of the columns on this panel.
  - **Payment Month** is the month covered by the payment.
  - **Transaction Date** is the date of the SSI Transaction cycle.
  - **Payment Status** is a code showing the current status of a payment transaction made from the Financial system. e.g. issued, cleared, stopped, voided. A description of the codes can be found in the **SSI Payment Status** panel in the **Related Data –Codes** section of the subsystem.
  - The **Payment Date** shows the date the check write voucher is posted to the Financial system. This is the Payment Date on the remittance advices and paper checks. It is not necessarily the release date of Electronic Funds Transfer (EFT) Payments.
  - **Record Status** displays the status of the payment record,
    - **A - Active** - set up for Financial Payment
    - **S - Suspense** - Payment is suspended from Financial processing
    - **P** - **Paid** by Financial
  - **State Amount** is the State's share of the specific SSI payment.
  - **Total State Amoun**t is the total State amount the state made in SSI payments to this Member for the Month.
  - The **Payment Number** is a unique identifier of the payment from the Financial system, either the check number, or EFT transmission number.

5.1.4 Member Related Data Other Panels

Step	Action	Response
1.	From the list of iC Functionality links, click **Member Related Data**.	The **Member Related Data** panel displays.
2.	On the left of the panel, click **Other**.	The Related Data Other links display.

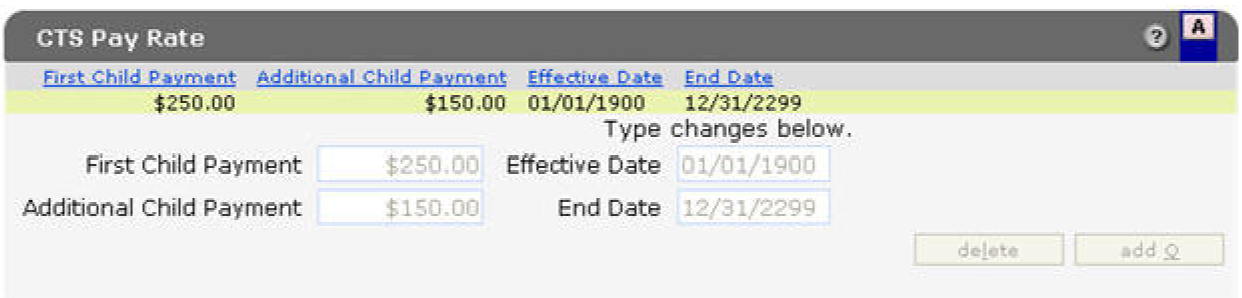
Related Data Other Panel Graphic



Related Data Other Panel Description

CTS Pay Rate

CTS Pay Rate Panel Graphic

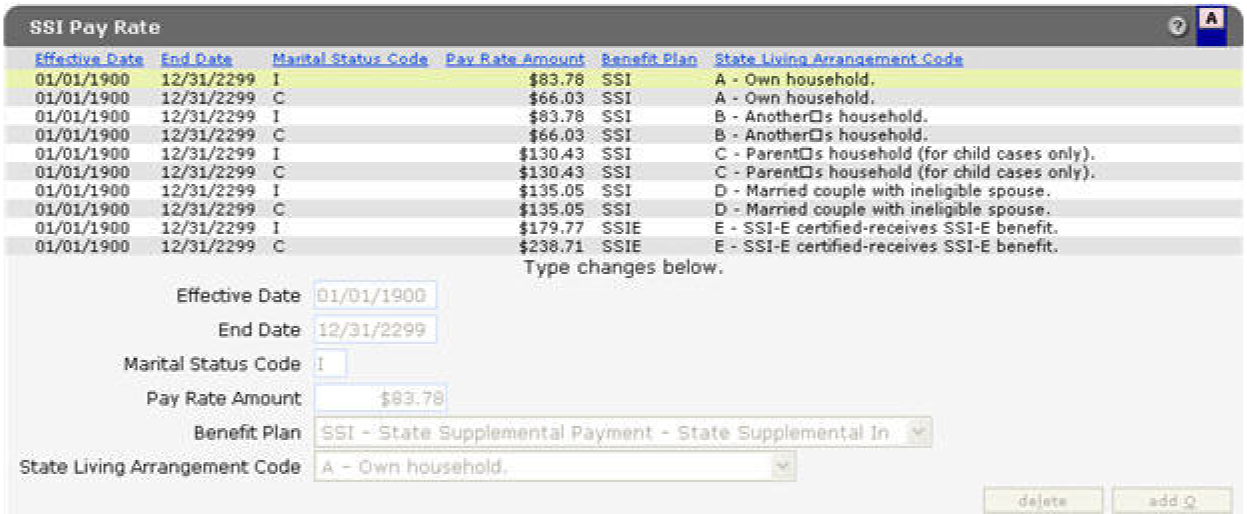


CTS Pay Rate Panel Description

- The **CTS Pay Rate** panel is used to display the Caretaker Supplement payment rates and their effective dates.
  - The **First Child Payment** shows the monthly CTS Payment Amount for the first eligible child.
  - The **Additional Child Payment** field displays the monthly CTS Payment Amount for each additional child.
  - The **Effective** and **End Date** fields show the dates this payment record is in effect.

SSI Pay Rate

SSI Pay Rate Panel Graphic



SSI Pay Rate Panel Description

- The **SSI Pay Rate** panel is used to maintain the SSI pay rates.
  - The **Benefit Plan** field shows the benefit granted to a Member who is enrolled to receive the service.
  - The **Effective** and **End Dates** show period the pay rate record is in effect.
  - **Marital Status Code** is the Member's Marital status code for payment rate calculations. I for Individual or C for Couple.
  - The **Pay Rate Amount** field shows the standard Monthly SSI pay rate.
  - The **State Living Arrangement Code** field displays the SSI Member's State Living Arrangement Code.

6 General Portal Information

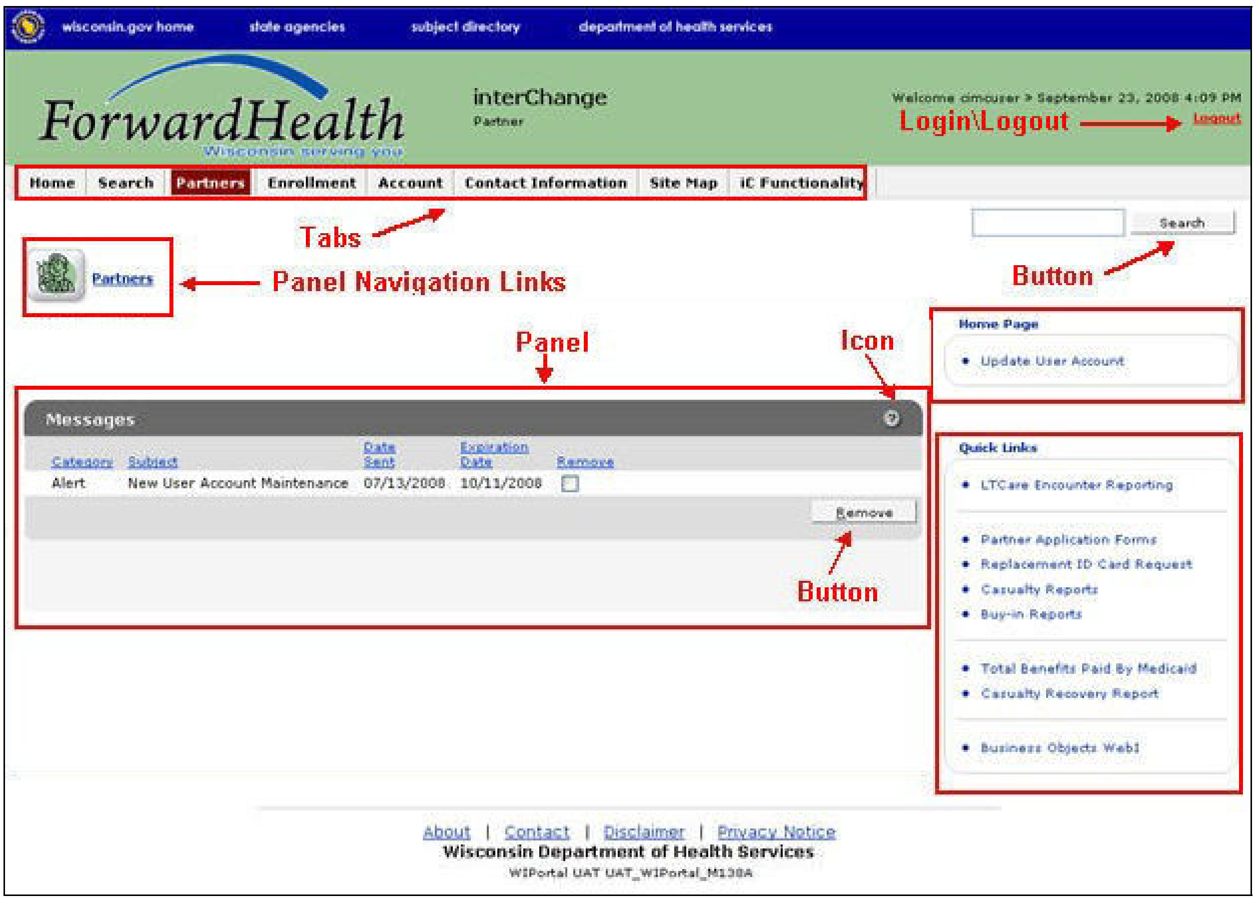
6.1 Logging On and Off the Portal

The quickest way to log onto the Portal is to click the **Login** link in the upper-right corner of any screen, and enter your username and password. Once you log in, the link changes to **Logout**.

When you are finished with any session, always remember to click the **Logout** link.

6.2 Portal Navigation

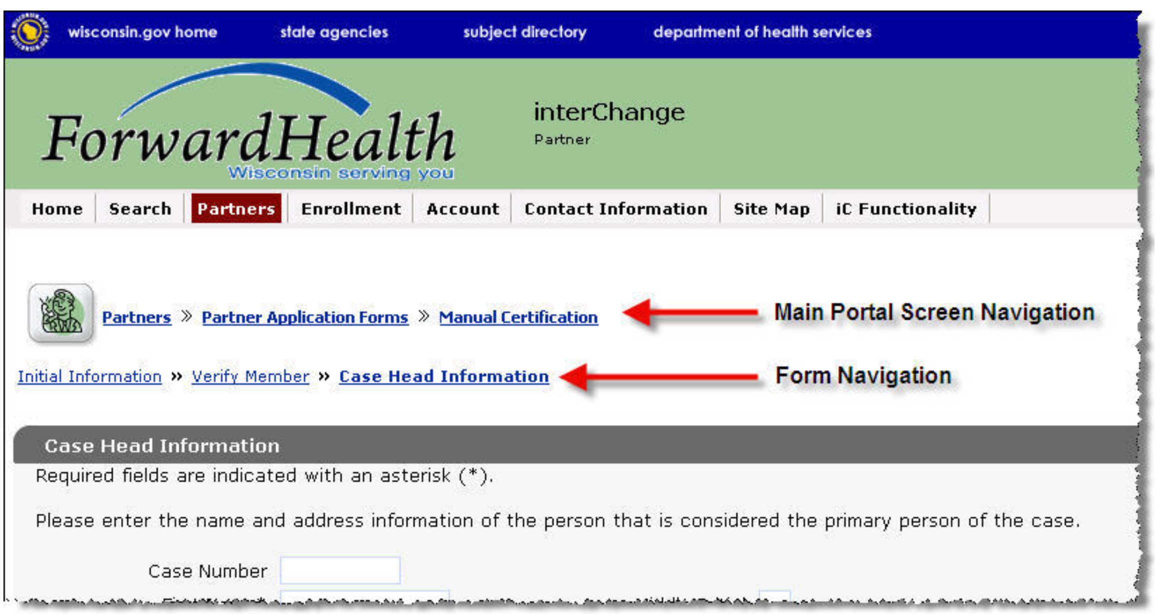
There are several navigation features on every screen and/or panel that display on the portal pages and panels.



- **Tabs**—Once you log in to the secure partner portal, the first tab that displays is the Partners tab. Click on any other tab to move to different parts of the Portal.
  - **Home** takes you back to the public portal Home page.
  - **Search** displays a text box to enter text, and you can select an area to search Partners
  - **Enrollment** displays the Enrollment Verification panel, which lets you verify that a member is enrolled through his or her Member ID or SSN, and date of birth. This is a summary level verification tool.

- ♦ **Account** lets you manage your main account information, messages, and change your password. It also contains a link to the user guide for this tab, which is in PDF format.
- ♦ **Contact Information** lets you ask a question of tech support.
- ♦ **Site Map** is a series of links that imitate the tab structure and tab choices.
- ♦ **iC Functionality** is a subset of the panels you can access through the portal which Provide more detailed member information.
- ♦ **Panel**—The panel shown here is the Message panel that lets you know if there are any changes or new items for the Partner portal.

- **Login/Logout**—This is a link that toggles between displaying the username/ password text boxes (**Login**) or logging you out of the system (**Logout**).
- **Other features**: links at the bottom (About, Contact, Disclaimer, Privacy Notice) and top (Wisconsin.gov home, state agencies, subject directory, and department of health services) are part of every standard portal window and lets you know State-specific information.
- **Panel Navigation** links—One of the features of the portal to help you track what links you've clicked to end up on the current screen, such as shown in this example:



- o The Main Portal Screen Navigation displays links display you clicked from the main Partner page to get to your present form or screen.
- o The Form Navigation links display tells you how far you've progressed into an online form, as well as the order. If you click the **Previous** button, you will go one link backwards; for example, from **Case Head Information** to **Verify Member**. If you click on a navigation link, you go directly to that page or panel.
- o It is important to note that users should **never** use your browser's **BACK** button to return to a previous screen.

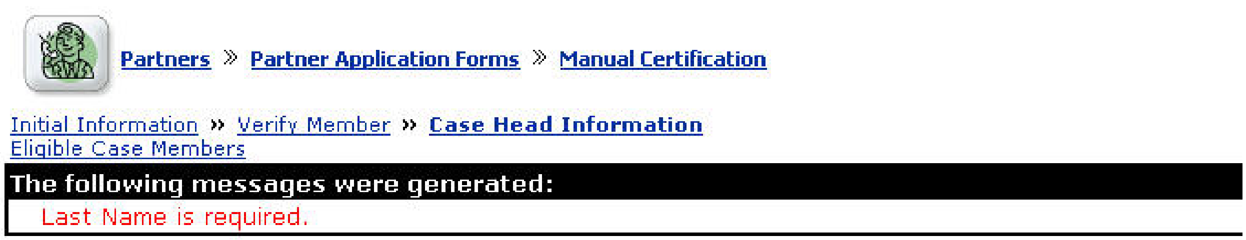
6.2.1 Buttons

Below is a list of common buttons and the operations they are normally used for.

Button	Click it and this happens
Clear	Clears all the information entered into the fields on a panel.
Close	Closes a window, such as a popup window.
Save	Saves a modification made to a panel or a new record (for authorized users that can make updates)
Remove	Deletes an onscreen message.
Search	Initiates a search.

6.2.2 Error Messages

Error messages most commonly appear when you enter information incorrectly in a field or when you do not enter information in a required field. These error messages display just beneath the navigation links at the top of a panel but may also appear next to a field that is in error. Messages also display as a warning that the user is navigating away from a page.

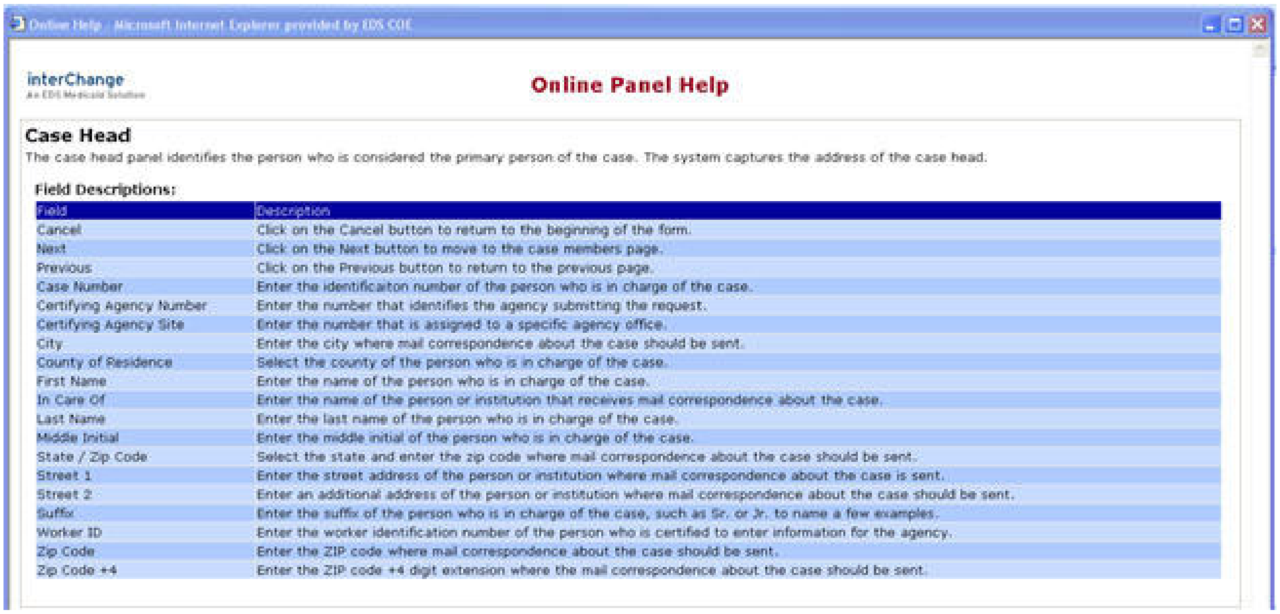


- If unsure what an error message means, users can find more error message information by clicking the question mark icon on the gray bar at the far right of each screen. The panel help with all field descriptions and error messages will appear.

6.3 Partner Portal Online Help

6.3.1 Panel Help

Panel help is accessed by clicking the question mark icon on the gray bar at the far right of each screen.



Case Head

The case head panel identifies the person who is considered the primary person of the case. The system captures the address of the case head.

Field Descriptions:

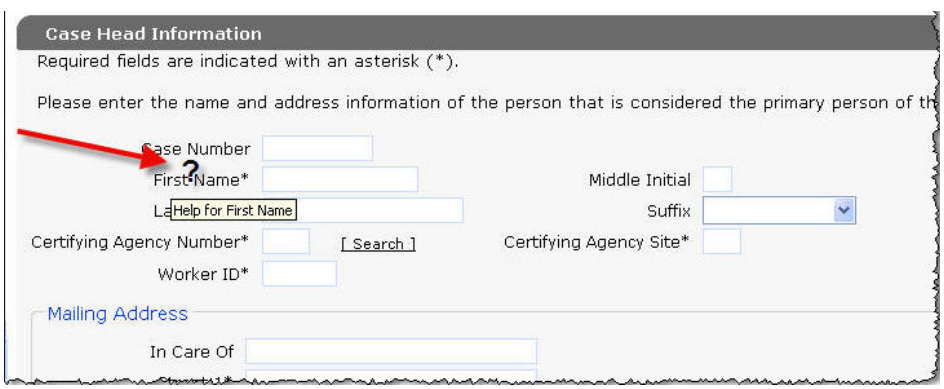
Field	Description
Cancel	Click on the Cancel button to return to the beginning of the form.
Next	Click on the Next button to move to the case members page.
Previous	Click on the Previous button to return to the previous page.
Case Number	Enter the identificaiton number of the person who is in charge of the case.
Certifying Agency Number	Enter the number that identifies the agency submitting the request.
Certifying Agency Site	Enter the number that is assigned to a specific agency office.
City	Enter the city where mail correspondence about the case should be sent.
County of Residence	Select the county of the person who is in charge of the case.
First Name	Enter the name of the person who is in charge of the case.
In Care Of	Enter the name of the person or institution that receives mail correspondence about the case.
Last Name	Enter the last name of the person who is in charge of the case.
Middle Initial	Enter the middle initial of the person who is in charge of the case.
State / Zip Code	Select the state and enter the zip code where mail correspondence about the case should be sent.
Street 1	Enter the street address of the person or institution where mail correspondence about the case is sent.
Street 2	Enter an additional address of the person or institution where mail correspondence about the case should be sent.
Suffix	Enter the suffix of the person who is in charge of the case, such as Sr. or Jr. to name a few examples.
Worker ID	Enter the worker identification number of the person who is certified to enter information for the agency.
Zip Code	Enter the ZIP code where mail correspondence about the case should be sent.
Zip Code +4	Enter the ZIP code +4 digit extension where the mail correspondence about the case should be sent.

Panel Help Feature - Question Mark Function Description

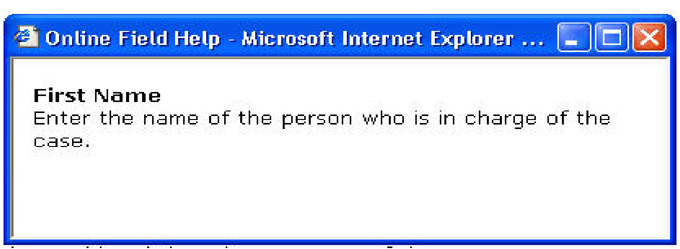
- ➢ The panel help lists the name of all fields and buttons on the panel (buttons alphabetically first, then fields alphabetically), along with their descriptions and error messages. These descriptions are the same as what users see when users access field help.

6.3.2 Field Help

- ➢ If users hover over the name of a field, users will see a question mark:



- When you click on the field, you see a pop-up box that includes the field description.



7 Contact Information

EDS-HP is responsible for providing support to IM Workers. The document below provides contact information for EDS-HP.

	EXTENTION 80221	EXTENSION 80220	EXTENSTION 80213
Agency Assignments Eligibility P.O.Box 7636 Madison, WI 53713 (608) 221-4746 STAFF/CERTIFYING AGENCY ASSIGNMENTS	001 Adams 002 Ashland 003 Barron 004 Bayfield 005 Brown 006 Buffalo 007 Burnett 008 Calumet 009 Chippewa 010 Clark 011 Columbia 012 Crawford 013 Dane 014 Dodge 015 Door 016 Douglas 017 Dunn 018 Eau Claire 019 Florence 020 Fond du Lac 021 Forest 022 Grant 023 Green 024 Green Lake 025 Iowa 026 Iron 027 Jackson 028 Jefferson 029 Juneau 041 Monroe 042 Oconto 043 Oneida	040 Milwaukee 044 Outagamie 045 Ozaukee 046 Pepin 049 Portage 051 Racine 053 Rock 058 Shawano 059 Sheboygan 060 Taylor 061 Trempealeau 062 Vernon 063 Vilas 070 Winnebago 071 Wood 072 Menomonie 080 RNIP 090 RNIP 100s – 600s	030 Kenosha 031 Kewaunee 032 LaCrosse 033 LaFayette 034 Langlade 035 Lincoln 036 Manitowoc 037 Marathon 038 Marinette 039 Marquette 047 Pierce 048 Polk 050 Price 052 Richland 054 Rusk 055 St. Croix 056 Sauk 057 Sawyer 064 Walworth 065 Washburn 066 Washington 067 Waukesha 068 Waupaca 069 Waushara 830 Katie Beckett

Eligibility Supervisor	Ext. 80202
Eligibility Team Lead	Ext. 80201
Nursing Home Authorization	Ext. 80201
SLMB/QMB/Buy-In	Ext. 80216
EDS TPL/COB	Ext. 80058

Resource **Prior** to November 10, 2008 ForwardHealth interChange Implementation	Resource **On and After** November 10, 2008 ForwardHealth interChange Implementation
Member Services (BadgerCare Plus and Medicaid) **800-362-3002** • Available 7:30 a.m.-5:00 p.m. Monday-Friday **Member Services (WCDP)** **608-221-3701** • Available 8:30 a.m.-4:30 p.m. Monday-Friday **Member Services (WWWP) - Not currently available**	**Member Services (all programs except SeniorCare)** **800-362-3002** • Available 7:00 a.m.-6:00 p.m. Monday-Friday
Member Services (SeniorCare) **800-657-2038** Available 7:30 a.m.-5:00 p.m. Monday-Friday	**Member Services (SeniorCare)** **800-657-2038** Available 7:00 a.m.-6:00 p.m. Monday-Friday
Medicaid Managed Care Contract Monitors and Ombudsmen **800-760-0001** • Recipient appeals and grievances regarding State Contracted Managed Care Organizations • Available 8:00 a.m.-4:30 p.m. Monday-Friday	**ForwardHealth Managed Care Ombudsmen (BadgerCare Plus only)** **800-760-0001** • Recipient appeals and grievances regarding State-Contracted Managed Care Organizations • Available 8:00 a.m.-4:30 p.m. Monday-Friday
Medicaid and BadgerCare Plus Web Sites • dhs.wisconsin.gov/medicaid/ • dhs.wisconsin.gov/badgercareplus/ **ForwardHealth Implementation Information Web Site** • dhs.wisconsin.gov/forwardhealth/ **ForwardHealth Portal Web Site – Trading Partners only** • www.forwardhealth.wi.gov/	**ForwardHealth Portal Web Site – Providers, Trading Partners, Partners, HMOs** • www.forwardhealth.wi.gov/ **ForwardHealth Portal Web Site – Members** • www.forwardhealth.wi.gov/members
Webcasts • dhs.wisconsin.gov/forwardhealth/	**Webcasts** • www.forwardhealth.wi.gov/

Appendix A - ForwardHealth Benefit Plans

Full Benefit Plans	**Note:** BadgerCare, Family MA & Healthy Start med stats (benefit plans) ended 01/31/08. They were replaced by BadgerCare Plus effective 02/1/08.
BC	BadgerCare
BCSP	BC+ Standard Plan
BCBP	BC+ Benchmark Plan
BCBPD	BC+ Benchmark Plan and Dental
MCD	Medicaid
MCDW	Medicaid Waiver
MAPW	Medicaid Purchase Plan Waiver
MAP	Medicaid Purchase Plan
WWMA	Wisconsin Well Woman Medicaid
SSIMA	Medicaid for SSI
FSTMA	Medicaid for Foster Care
Limited Benefit Plans	
BCBEE	BC+ Benchmark Express Enrollment for Pregnant Women
BCSEE	BC+ Standard Express Enrollment for Pregnant Women
PE	Presumptive Eligibility - Pregnancy
FPW	Family Planning Services Only
FC	Family Care Non-MA
QMB	Qualified Medicare Beneficiary
SC1	Senior Care Level 1- 0 to 200% FPL
SC2	Senior Care Level 2- Over 200% FPL
WCDK	Wisconsin Chronic Disease-Renal Disease
WCDH	Wisconsin Chronic Disease-Hemophilia HomeCare
WCDC	Wisconsin Chronic Disease-Adult Cystic Fibrosis
WWWP	Wisconsin Well Woman Program
Benefit plans without health services	**There are no health care services payable for these benefit plans. The state pays Medicare premiums or issues other cash benefits.**
SLB	Specified Low-income Medicare Beneficiary
SLB+	Specified Low-income Medicare Beneficiary Plus
QDWI	Qualified Disabled Working Individuals
SSI	State Supplemental Payment - State Supplemental Income
SSIE	State Supplemental Payment - State Supplemental Income Exceptional
CTS	State Supplemental Payment - Caretaker Supplement